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ABSTRACT

This "blueprint for the future," a statement of affirmation and aspiration, centers on five guiding principles for the federal Office of Museum Services (OMS) within the Institute of Museum and Library Services (IMS), with some specific steps for putting the principles into action. The blueprint speaks of the Institute of Museum and Library Services's history of effectiveness in supporting museums and sees great promise in the Office of Museum Services's future. It cites as the five guiding principles for OMS action in the future: (1) reaffirm the historical emphasis of IMS support for museums; (2) promote innovation and reward excellence in every area of support; (3) stimulate the development and distribution of tools and examples that guide museums toward excellence; (4) encourage and enable sustainable partnerships between museums and other organizations; and (5) articulate and communicate the roles of museums and a vision for their future. The blueprint identifies other critical issues for museums and outlines the action steps that IMS is undertaking already. (BT)

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To Listen and to Lead

OMS can help us advance ourselves and define paths that we can't even imagine now.

NINA M. ARCHABAL, DIRECTOR, MINNESOTA HISTORICAL SOCIETY

The sociologist Robert Bellah reminds us that we are only able to understand ourselves and our future in constant conversation with the past. "Memory and hope," he writes, "belong together."

In celebration of the twentieth anniversary of the Institute of Museum Services in 1996, we linked the agency's past with its future. We began this effort, which we called the "Blueprint for the Future," at the American Association of Museums annual meeting in 1996. Later that summer, a group of museum professionals gathered in Washington, D.C., for lively, thoughtful conversations about future directions for the Office of Museum Services within the Institute of Museum and Library Services. The broad framework they proposed was then opened for discussion in small-group meetings that National Museum Services Board members organized in their regions.

Many other conversations—at national, regional, and state museum association meetings, with individual museum professionals—contributed to the mix. Writer Ellen Cochran Hirzy and Institute of Museum and Library Services staff members, especially Mamie Bittner and Rebecca Danvers, shaped these ideas into a written report. In the end, we have what NMSB chairman Kinshasha Holman Conwill calls a "blueprint for the future written by many hands, with many tools, in a variety of shades and colors." It centers on five guiding principles for OMS, with some specific steps for putting the principles into action.

I came to the Institute of Museum Services as an ardent populist. My greatest satisfaction has been seeing museums use their collections to serve the public. My

passion about museums has always been their power to offer connections. Museums link people to ideas and objects, to the past and the future, to their communities and the world beyond. They embody the connection between memory and hope.

To Listen and to Lead: A Blueprint for the Future is a statement of affirmation and aspiration. We are proud of IMS's history of effectiveness in supporting museums, and we see great promise in OMS's future. We can achieve what's possible by listening and by leading: by taking in the wisdom of our colleagues in the museum field, and by providing the leadership that inspires museums to serve their public.

Diane B. Frankel
Director
Institute of Museum and Library Services

A BLUEPRINT FOR THE FUTURE

To Listen and to Lead

Twenty years ago, the Institute of Museum Services inaugurated an unprecedented program of federal funding for museums. This new agency was the first to provide grants for general operations. It was also the first to give substantial support to small museums and extend grants to institutions of all types and sizes—zoos and art museums, small rural historical societies and large urban natural history museums. IMS embodied the nation's confidence in its museums. It grew out of a fundamental belief that museums—as places of collective memory and centers for education—merit public support.

For two decades, IMS has helped America's museums strengthen their capacity for preservation, for education, and for building community connections. Thousands of success stories show what a difference the agency has made: major improvements in collections care and preservation, productive museum-school partnerships, increased outreach, enhanced institutional planning, a stabilized funding base.

During 1996-97, as IMS celebrated its twentieth anniversary, the National Museum Services Board and the IMS staff invited the museum community to engage in a dialogue about the agency's future. As we listened to these museum professionals' thoughtful observations, we heard enthusiasm for innovation and appeals to continue IMS's successful grant programs. We heard the desire to know more about "promising practices" that contribute to effectiveness. We heard affirmations of museums' significant responsibilities for education, stewardship, and research. And we heard an eagerness for community connections that will intensify museums' public service. Along with talk of change, there was a consistent concern about issues that threaten museums.

The timing of our conversations was especially appropriate, because IMS's twentieth anniversary coincided with the creation of the Institute of Museum and Library Services and the continuation of IMS programs under the new Office of Museum Services. The agency's constituency has grown, but museum programs remain intact. There is great potential for fresh, innovative thinking that will guide these programs into the future and lead to fruitful linkages built on the complementary strengths of museums and libraries.

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Museums need new approaches to addressing needs and concerns. This is something the Institute of Museum Services has done–provide the tools that support planning and problem solving.

CAROLYN L. ROSE,
DEPUTY CHAIRMAN,
DEPARTMENT OF
ANTHROPOLOGY,
NATIONAL MUSEUM OF
NATURAL HISTORY,
SMITHSONIAN
INSTITUTION

OMS can sweep away the trendy and the politically correct and substitute a new kind of serious professional language that really helps the field make progress.

RONNE HARTFIELD, EXECUTIVE DIRECTOR, MUSEUM EDUCATION, ART INSTITUTE OF CHICAGO

To Listen and to Lead is a statement of philosophy, leadership, and action to guide OMS's service to museums. We learned from museum professionals that our fundamental program of support is highly effective. We heard, however, that to be a vital force for museums we must continue to listen *and* lead. Active involvement in the museum community gives National Museum Services Board members and IMLS staff useful insights that inform our program development and grant making. With this firsthand understanding we can provide more enlightened leadership, ultimately helping museums to preserve the nation's cultural and natural heritage, strengthen their capacity for public service, and make connections with other community institutions.

After our year of dialogue with the museum community, we concluded that OMS has:

- a program of support that works for museums and the public they serve
- an obligation to promote innovation and excellence
- a role in articulating "promising practices"
- the potential to stimulate sustainable partnerships between museums and other organizations
- a responsibility to articulate museum's role in our society.

In this report, we propose five principles to guide our program development and grant making. In the context of these principles, we outline seven steps to help us put these principles into action.

GUIDING
PRINCIPLES

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Reaffirm the historical emphasis of IMS support for museums.

Two central concepts distinguished the Institute of Museum Services when it was created: grants for general operating support (GOS) and support to an inclusive pool of institutions. Small museums in particular, typically under-served by federal funding agencies, benefited from the establishment of IMS. Early decisions about what IMS should support resulted in the focus that continues today: on general operating support, collection preservation, technical assistance, and professional development.

The principle of general operating support is grounded in the notion that museums are central to our communities. As institutions that serve the public, reasoned the Congress in the Museum Services Act of 1976, they merit relief from "the financial burden borne . . . as a result of their increasing use." Over the years, GOS has been much more than financial relief. Support for infrastructure gives museums a foundation from which to improve their financial stability. A broader base of support—a partnership between the private and public sectors—flows from this solid foundation. OMS grants are peer-acknowledged signs of excellence, and thus they provide leverage for funding from other sources.

OMS should operate in the context of other national funding initiatives that are pushing change.

KINSHASHA HOLMAN CONWILL, DIRECTOR, THE STUDIO MUSEUM IN HARLEM

Another notable achievement for IMS has been its participation in the evolution of professional practices through its grant-making criteria and its peer review process. The Museum Assessment Program, Conservation Project Support, the Conservation Assessment Program, Museum Leadership Initiatives, and the Professional Services Program—as well as GOS grants—all stimulate internal improvement and have contributed significantly to the museum field's capacity for self-assessment and institutional change. Countless museums do a better job of preserving their collections because they gained the impetus, the information, or the materials through these programs. Others have expanded and enriched their public educational efforts. Many more have taken steps to improve institutional effectiveness and advance professional standards.

The philosophy and framework of OMS's core programs are still viable today. Peter Raven, director of the Missouri Botanical Garden and former chairman of the National Museum Services Board, has observed that the agency "will continue to be most effective if it maintains its historical emphasis on the full diversity of America's museums, on general operating support, on peer review, and on programs . . . that support those objectives."

What has changed is the context for OMS's support. During the past two decades, museums have grown in numbers and diversity. On the one hand, museums have made vast improvements in professional

standards and practices. Veteran observers of museums, including OMS peer reviewers, see more effective governance, sounder management practices, more astute planning, significant advances in collections care and management, and a clearer focus on public service. On the other hand, professional development and financial stability remain elusive for many. Among the 75 percent of the nation's museums that identify themselves as small museums, for example, many have no professional staff yet are their communities' only cultural resources. A survey by the Association of Art Museum Directors revealed that 25 percent of the responding museums had run deficits in the last three years. When the American Association of Museums surveyed its member institutions, 89 percent of the respondents cited a critical need for "funds to meet basic commitments." Only 8 percent believed that the museum community has adequate resources to cope with its most critical issues in the near future. Clearly, OMS must sustain its commitment to infrastructure and institutional advancement while continuing to seek the maximum gain from federal investment.

2 Promote innovation and reward excellence in every area of support.

Creativity, risk taking, and the desire for authentic change—these are the qualities that move museums forward. OMS can continue to encourage excellence and inspire concrete improvements. It can also promote novel approaches to recurring challenges, concerted efforts at collaboration or community involvement, and

commitments to effect institutional change. Through its grant making, OMS can lead by example.

The museum community told us that rigorous peer review should be the starting point because it is an important impetus for excellence. They appreciated our efforts to reduce the workload for reviewers so that the most experienced, senior-level professionals are able to participate. The prospect of a close and thoughtful appraisal by knowledgeable peers is an incentive to strive for the best.

The educational and curatorial and conservation functions have to come into balance, and OMS can help us prevent the swings that place one function over another.

NINA M. ARCHABAL, DIRECTOR, MINNESOTA HISTORICAL SOCIETY

OMS can reward risk taking and encourage museums engaged in systemic change or continuing self-assessment. It can fund creative pilot projects that have high potential for adaptation and replication in other museums. One mechanism for encouraging innovation is the Museum Leadership Initiatives program. The willingness to experiment is a great asset of museums receiving MLI grants. A project may not turn out as its planners anticipated, but the accumulated wisdom often contributes to professional growth and institutional advancement. Excellence and innovation are also rewarded through the National Award for Museum Service, which honors museums for exemplary community involvement.

3 Stimulate the development and distribution of tools and examples that guide museums toward excellence.

Museum professionals made it clear that they want more opportunities for sharing information about "promising practices" that other institutions have tested and used. They are eager for exposure to more options, ideas, and processes. Learning from colleagues in other institutions is a critical intellectual stimulus that adds value and vitality to the work museum professionals do.

In institutions that receive IMLS funding, the tools and examples are plentiful. OMS will encourage the development and articulation of replicable practices and then pursue strategies for taking this information to a wider audience of museum colleagues. Museum service organizations are valuable partners in this effort. "Promising practices" are not formulaic approaches to museum programs and operations—what one museum professional called a "museum in a box." Instead, a sense of what constitutes promising practice allows museum professionals to evaluate alternatives and make appropriate decisions for their own institutions. A grasp of the possibilities also stimulates creativity and innovation in museum management and program development.

Digital media offer abundant opportunities for sharing knowledge and information within the museum community. OMS is joining with museums and professional organizations to explore creative

possibilities that match appropriate technology with the needs of the field. Information can also reach the museum community in traditional ways, through a widely distributed publication, for example, or a workshop or professional meeting. It can be shared through mentor relationships between individuals or institutions. Publications produced with Professional Services Program grants are excellent vehicles, and so are Museum Leadership Initiatives projects.

4 Encourage and enable sustainable partnerships between museums and other organizations.

Partnerships, collaborations, connections: whatever we call them, joint efforts involving museums and other organizations—libraries, schools, universities, media organizations, community groups, other museums and cultural institutions—extend the impact of museums. They link museums to an expanded constituency and give staff firsthand experience with the needs and interests of a broader potential audience. Partnerships also heighten the participating organizations' public visibility by drawing attention to a community's collective educational and cultural resources. Sometimes, collaboration leads to more efficient use of funds. It generates the critical mass needed to accomplish things that organizations might not be able to accomplish individually.

In practice, true collaboration—in which all partners mutually agree on goals and then contribute and benefit according to their expectations and cap-

abilities—is not always easy to achieve and sustain. Collaboration requires an investment in human and financial resources, and it takes time as well as thoughtful planning. In partnerships between museums, the very diversity that makes museums such a rich and productive group of institutions sometimes creates difficulties. With other partners, the differences in organizational culture can affect communication.

Nevertheless, these obstacles are surmountable, and museums are eager to move ahead. In fact, joining with other institutions will be not only desirable but essential in the future. "One of the clearest paths to [IMLS's] continued relevance as a leadership agency," writes National Museum Services Board chairman Kinshasha Holman Conwill, "will be the ability to strengthen strategic alliances with communities, the private sector (particularly foundations and corporate funders), other cultural organizations, and professionals in the museum field." Especially because of the great potential for museum-library cooperation through IMLS programs, OMS is in an ideal position to help museums seek deeper community connections. The result can be more extensive links to potential audiences as well as a more visible role and reputation for museums as essential community institutions.

IMLS has already signaled its firm support for partnership development. The Museum Leadership Initiatives program focused first on mentorships, then on museums and schools, and currently on museums

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Publicize the results of innovative projects, even when they are not highly successful. What did not work for one museum may be ideal for another one.

KAROL SCHMIEGEL, DIRECTOR, BIGGS MUSEUM OF AMERICAN ART, DOVER, DELAWARE

and community organizations. *True Needs, True Partners: Museums and Schools Transforming Education*, a book resulting from the 1994 MLI grant program, outlines characteristics of successful partnerships and includes museum and school educators' honest assessments about what works and what doesn't work. In September 1997, MLI grants were awarded to strengthen interaction among museums and community-based organizations.

IMLS itself models long-term collaborative relationships. We serve museums by involving them, and we value our close cooperation and dialogue with national, regional, state, and local professional organizations, which are links to the museum community. Directly through grant programs and indirectly through board and staff efforts, OMS promotes relationships among these organizations. The Museum Assessment Program and the Conservation Assessment Program are partnership success stories. Another example is the current cooperative agreement to conduct research on the nature of learning in museums, awarded jointly by four federal agencies—IMLS, the National Science Foundation, the National Endowment for the Arts, and the National Endowment for the Humanities—to the University of Pittsburgh's Learning Research and Development Center. In the future, IMLS also has a potential role in bringing together representatives of public and private funding agencies for conversations about ensuring a diverse system of support that meets museums' needs. Above

all, the new agency can highlight the strengths of museums and libraries while stimulating greater cooperation and mutual learning.

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Articulate and communicate the roles of museums and a vision for their future.

While the sheer number of visitors, nearly a half billion a year, is a clear demonstration of public service, museums are concerned about their ability to communicate about their multiple roles. In local communities and on the national level, the potential of museums as vital educational institutions and as centers of civic life could be more fully realized. Museums do not always claim their place in shaping and defining matters of community interest or national policy.

OMS is in an excellent position to draw national attention to museums. Joining with professional associations that serve the museum community, we can take on an expanded role within the federal government and nationwide. OMS's grant programs offer a broad picture of excellence, innovation, and public service in American museums. A logical corollary is to make the assets of museums and the extent of their contributions more widely known. Willard Boyd, former president of the Field Museum of Natural History and former chairman of the National

OMS's long-term role has been rewarding excellence, not being a remedial organization.

THOMAS KRAKAUER, EXECUTIVE DIRECTOR, NORTH CAROLINA MUSEUM OF LIFE AND SCIENCE

Museum Services Board, asserts that OMS can "help museums craft a future which makes them central to the lives of the American public."

Other Critical Issues for Museums Our conversations in the museum community also affirmed the many critical issues that OMS will join museums in addressing. They include:

- **Growing public expectations.** Museum professionals want to satisfy rising demands for their institutions' rich educational resources, and they are seeking the capacity to meet these needs.
- **Stewardship of collections.** Care, preservation, and use of the objects museums hold in the public trust are critical concerns for every collecting institution. Museums with large, complex research collections or living collections have a heightened interest in this issue because their collections hold the key to public understanding of the conservation of species.
- **The potential of digital media.** Technology is already a partner in enhancing museums' educational resources and making them more widely available. Yet despite the ubiquitous nature of digital media in our society, its potential connection to the museum experience is just beginning to be explored.
- **Financial stability.** In museums of all sizes, the availability of resources is a continuing concern.

ACTION STEPS

During the preparation of this report, we began to take positive steps toward putting the guiding principles into action. Some of these activities are new, some are in progress, and some continue IMS's traditional role.

- **CONTINUE CORE PROGRAMS OF SUPPORT.** IMLS announced will provide grants to museums across the nation, continuing its distinctive tradition of support for general operations, collection preservation, professional development, public education, and building community connections.

- **MAINTAIN A RIGOROUS PEER EVALUATION AND REVIEW PROCESS.** Each year nearly 500 museum professionals volunteer their time to review OMS grant applications. Active, experienced peer reviewers are key to the agency's philosophy of support.

- **ESTABLISH AN OFFICE OF RESEARCH AND TECHNOLOGY.** This new office will provide a focus for evaluating grant programs and activities, disseminating information about promising practices, and exploring telecommunications technology.

Think in terms of leadership initiatives and experimentation. Encourage expanding ownership of museums. Keep us connected to societal change.

LOUIS B. CASAGRANDE, DIRECTOR, CHILDREN'S MUSEUM, BOSTON

- **CREATE AN INTERACTIVE WORLD WIDE WEB SITE.** The IMLS Web site *(http://www.imls.fed.us/)* provides information about the agency's programs and links to museum-related resources on the Internet.

- **IDENTIFY AND DISSEMINATE PROMISING PRACTICES.** The Office of Research and Technology is exploring possibilities for sharing information through different media and formats.

- **ENCOURAGE, PROMOTE, AND SUPPORT COLLABORATION THROUGH PROGRAM POLICY AND AWARDS.** Across the board, and especially in the Museum Leadership Initiatives program, IMLS is focusing on the value of collaboration. National conferences on specific issues will expand thinking about partnerships and what they can achieve.

- **SEEK PARTNERSHIP OPPORTUNITIES FOR THE INSTITUTE OF MUSEUM AND LIBRARY SERVICES.** In partnership with other organizations and agencies, IMLS can extend its impact on museums. An example is the joint effort by federal agencies now under way through a cooperative agreement with the University of Pittsburgh's Learning Research and Development Center to define and analyze the nature of learning in museums.

The "museum community" is an apt term to describe a remarkable array of American institutions. Notable for their diversity, museums are also joined in shared purposes. The Institute of Museum Services, and now the Institute of Museum and Library Services, serves every corner of that community. As we prepared this report, we heard innovative ideas and constructive criticism, all offered as contributions to the common good. Ensuring the health, vitality, and visibility of our museums is a collective endeavor. The Office of Museum Services enters this third decade determined to listen and to lead—to continue a productive dialogue with museums and museum professionals across the nation, and to guide museums toward a future in which they are central forces in their communities.

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ABOUT THE INSTITUTE OF MUSEUM AND LIBRARY SERVICES

The Institute of Museum and Library Services (IMLS) is an independent federal agency that serves the public by strengthening museums and libraries. Through its Office of Museum Services, IMLS provides funding for all types of museums, including aquariums, arboretums and botanical gardens, art museums, youth museums, general museums, historic houses and sites, history museums, nature centers, natural history and anthropology museums, planetariums, science and technology centers, specialized museums, and zoological parks.

OMS provides support for museums through General Operating Support grants, the Museum Assessment Program, Conservation Project Support grants, and the Conservation Assessment Program. For museums and community partners, OMS offers the Museum Leadership Initiatives program and National Leadership Grants. The Professional Services Program supports professional museum service organizations.

For more information about these programs or to request application guidelines, contact:

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1100 Pennsylvania Ave., NW
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imsinfo@imls.fed.us (e-mail)

or visit the IMLS World Wide Web site at:
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